

New Jersey Schools Development Authority
OPERATING AUTHORITY BY LEVEL

Explanation of Operating Levels -- Titles Within Levels, By Operating Office and Division							
NJSDA Divisions/Units	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7 Members of the Authority
Office of the Chief Executive Officer						Chief Executive Officer	
Office of Governance and Compliance Divisions of: Chief Counsel; Risk Management; Records Management; Public Information; Audit & Compliance	<u>Div. Risk Management</u> Analyst Senior Analyst	<u>Div. Risk Management</u> Specialist	<u>Div. Audit & Compliance:</u> Director <u>Div. Risk Management:</u> Director <u>Office of Chief Counsel:</u> Assistant Counsel	<u>Office of Chief Counsel:</u> Chief Counsel Senior Counsel	Vice President Chief Counsel (settlement and legal actions)		
Office of the Chief Operating Officer Divisions of: Human Resources; Project Services & MIS; Labor Workforce; Contractor & Workforce Compliance; Real Estate Services; Procurement & Contract Services	<u>Div. Human Resources</u> HR Administrator <u>Div. Contr. & Wrkfrce Compl.:</u> Contractor Comp. Coord. <u>Div. Real Estate Services:</u> Assistant Specialist Specialist Sr. Specialist	<u>Div. Human Resources</u> HR Specialist <u>Div. Project Services & MIS:</u> IT Project Manager Sr. Facilities Supervisor <u>Div. Contr. & Wrkfrce Compl.:</u> Asst. Director <u>Div. Real Estate Services:</u> Manager Sr. Manager Assistant Director <u>Div. Proc. & Contract Services:</u> Procurement Manager Grants Manager	<u>Div. Human Resources:</u> Senior Director <u>Div. Project Services & MIS:</u> Director <u>Div. Contr. & Wrkfrce Compl.:</u> Director <u>Div. Real Estate Services:</u> Director <u>Div. Proc. & Contract Svcs.:</u> Senior Director (this title may also act as a Level 3 for the Division of FFTE in the Office of Program Management & Planning)	<u>Div. of Real Estate Services:</u> Managing Director <u>Div. Project Services & MIS:</u> Managing Director	Chief Operating Officer & VP		
Office of the Chief Financial Officer		<u>Div. General Acct. Budgets:</u> Senior Manager	<u>Div. Contract Acct. Disburs.:</u> Director	Controller	Chief Financial Officer & VP		
Office of Project Management Divisions of: Arch. & Engineering; Contract Management; Project Management; Safety Management	<u>Div. Project Management:</u> Manager	<u>Div. Project Management:</u> Assistant Director Senior Project Manager <u>Div. Contract Mgmt.:</u> Contracts Manager Est. & Scheduling Manager	<u>Div. Project Management:</u> Regional Director <u>Div. Contract Mgmt.:</u> Director <u>Div. Special Projects:</u> Senior Director Director <u>Div. Arch. & Eng.:</u> Director <u>Div. Safety Management:</u> Director	<u>Div. of Management & Support</u> Director of Operations	Vice President		
Office of Program Management and Planning Divisions of: Program Management; Project Controls; FFT&E ; Strategic & Capital Planning	<u>Div. FFT&E :</u> Sr. Purchasing Analyst	<u>Div. Project Controls:</u> Manager <u>Div. Program Management</u> Manager <u>Div. FFT&E :</u> Specialist Senior Specialist	<u>Div. Project Controls</u> Senior Director <u>Div. FFT&E</u> Director <u>Div. Strategic & Capital Planning</u> Director		Vice President		

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Recommendation and Approval of Authority Annual Budget, Plans, Project Charters							
Operating Scope Authority Elements Relating to Budgets & Planning	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
Approval of NJSDA Annual Operating Budget (All division and department heads are responsible for ensuring all purchases and/or commitments are within their approved annual operating budget.)							Board approval required.
Authority Plans (including Capital Commitment and Strategic Plans)					Recommendation of the Vice President of Program Management and Planning	Approval of the CEO required prior to Board presentation.	Board approval required (Board notification of any change to an approved Plan required)
Project Charter (including project overview, scope, project cost estimate and anticipated substantial completion date)			Upon recommendation of the Core Team, recommendation of the Sr. Director of Project Controls and the Regional Director of Project Management	Upon recommendation of the Core Team, recommendation of the Managing Director, Real Estate Services	Recommendation of the Vice President of Program Management and Planning and the Vice President of Project Management	Approval of the CEO required prior to Board presentation.	Board approval required
Revised Project Charter			Upon recommendation of the Core Team, recommendation of the Sr. Director of Project Controls and the Regional Director of Project Management	Upon recommendation of the Core Team, recommendation of the Managing Director, Real Estate Services	Recommendation of the Vice President of Program Management and Planning and the Vice President of Project Management of changes to project cost estimates -or- Co-approval of the Vice President of Program Management and Planning and the Vice President of Project Management of schedule changes not impacting school occupancy date	Singular approval by the CEO of changes to project cost estimates which singularly or in the aggregate do not exceed 10% of approved initial Project Charter estimate -or- a schedule change of any length, impacting school occupancy date	Board approval required of revisions due to/based upon a DOE modeling change, an emergent change to any ongoing project, substantial increase or decrease to student population or a scope of work change that impacts project type -or- of change of project cost estimates which singularly or in the aggregate exceed 10% of the most recent Board-approved Project Charter estimate
Final Project Budget - based on the Construction Award <i>Also refer to the Contracts for Construction Services Operating Scope page</i>					Recommendation of the Vice President of Program Management and Planning and the Vice President of Project Management	Singular approval by the CEO when the Construction Contract Award resulting from a competitive bidding process does not exceed 110% of the CCE in the most recent approved Project Charter	Board approval required when the Construction Contract Award resulting from a competitive bidding process exceeds 110% of the CCE in the most recent approved Project Charter

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Operating Scope Authority Elements Relating to Budgets & Planning	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
Program Contingency Release of Monies for unforeseen project events			Upon request of the Core Team, recommendation of the Sr. Director of Project Controls and the Regional Director of Project Management	Recommendation of the Managing Director, Real Estate Services if related to Real Estate Services activity	Recommendation of the Vice President of Program Management and Planning and the Vice President of Project Management Recommendation of the Chief Operating Officer if related to Real Estate Services activity	Singular approval by the CEO when the release of monies does not exceed 10% of the most recent approved Project Charter estimate or final project budget	Audit Committee notification required* Board notification required*
Program Contingency Release of Monies for emergent projects (if not delegated to a District through a grant)						Singular approval by the CEO for the release of monies to initiate the work to begin the emergent project process and the creation of an Emergent Project Charter** ----- Singular approval by the CEO for the release of monies for an emergent project up to and including \$2,000,000***	Audit Committee notification required* Board notification required* ----- Audit Committee notification required* Board notification required*
<p><u>Monthly Reports</u> will be provided to the Board of Directors including:</p> <ol style="list-style-type: none">1. Projects that have expended 75% of their Board-approved Project Charter contingency amount2. Projects that are projected to exceed their Board-approved Project Charter contingency amount3. Projects that are more than 90 days behind schedule4. Projects indicating the possible compromise of an occupancy date, inclusive of recovery plan, as appropriate5. All approved Change Orders during the previous month6. All revisions to Project Charters <p><u>Quarterly Reports</u>: will be provided to the Board of Directors regarding all active projects (i.e., those projects that are not deferred or closed-out.)</p> <p>* Refer to the Professional Services, Construction, Goods & Services or Construction Change Order pages for Approval Levels for release of monies exceeding 10% of the most recent approved Project Charter</p> <p>** For example, a Camden facade project currently estimated at \$10,000,000 - CEO could approve the contract for protective scaffolding with the balance of the work be presented in an Emergent Project Charter</p> <p>*** For example, CEO approval of an emergent boiler replacement project at a school</p>							

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Real Estate Services For purchases of land, relocation contracts and leases							
Operating Scope Real Estate Services	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
	Approvals for Levels 1, 2 and 3 must be staff from the Office of the Chief Operating Officer, Division of Real Estate Services.						
The following process is preceded by Board Approval through the Preliminary Project Charter and Review by the Office of Chief Counsel							
Approval of Land Acquisition Projects (including Site Identification, Initial Acquisition & Relocation Budgets)							Board approval required
Execution of non-fee conveyance documents such as Access Agreements and Utility Easements			May singularly execute	May singularly execute	May singularly execute	May singularly execute	
Execution of ancillary, closing-related documents (tenant short term lease/occupancy)			May singularly execute	May singularly execute	May singularly execute	May singularly execute	
Execution of documents that convey ownership interests (deeds)					COO may singularly execute	May singularly execute	
Execution of documents that convey ownership interests (purchase agreements, contracts and lease hold interests)			May singularly execute	May singularly execute	COO may singularly execute	May singularly execute	
Execution of term sheets				Recommendation of the Managing Director of the Division of Real Estate Services required	Recommendation of the Office of Chief Counsel and the VP of the Office of Project Management required COO may singularly execute		
DEP Required Institutional Controls for recording purposes (deed notices, restrictive covenants, conservation easements, etc.)			May singularly execute	May singularly execute	May singularly execute	May singularly execute	
The following lease actions are preceded by Board Approval through the Preliminary Project Charter and Review by the Office of Chief Counsel							

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Operating Scope Real Estate Services	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
	Approvals for Levels 1, 2 and 3 must be staff from the Office of the Chief Operating Officer, Division of Real Estate Services.						
Leases - Ground, Building, Swing Space, etc. Value: not exceeding \$250,000 Term: not exceeding 1 year	Recommendation required		Co-approval with Level 4 or higher	Co-approval			
Leases - Ground, Building, Swing Space, etc. Value: not exceeding \$1,000,000 Term: not exceeding 3 years	Recommendation required			Co-approval with Level 5 or higher	Co-approval		
Leases - Ground, Building, Swing Space, etc. Value: not exceeding \$2,000,000 Term: not exceeding 5 years	Recommendation required				Co-approval with Level 5 or higher	Co-approval with Level 5	
Leases - Ground, Building, Swing Space, etc. Value: exceeding \$2,000,000 Term: exceeding 5 years	Recommendation required						Board approval required
Execution of Leases			May singularly execute	May singularly execute	May singularly execute	May singularly execute	
A monthly report to the Board of Directors listing all executed leases and exercised leasing options is required.							

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Contracts for Professional Services Consultants - A Competitive Process							
For the procurement and award of contracts for professional services including architectural, engineering and land surveying and related services.							
Categories 1 - 5							
Operating Scope Professional Services	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
	Approvals for Levels 1, 2 and 3 must be staff from the Office of the Chief Operating Officer unless otherwise noted.						
Category 1, (advertisement not required) Compensation Less Than or Equal To \$29,000		With an award that does not exceed the estimate within the most recent approved Project Charter, co-approval with Level 5 or higher			With an award amount exceeding the estimate within the most recent approved Project Charter, co-approval with Level 6 required	With an award amount exceeding the estimate within the most recent approved Project Charter, co-approval required	
Category 2, (random selection process) Compensation Less Than or Equal To \$2,000,000		With an award amount of \$500,000 or less that does not exceed the estimate within the most recent approved Project Charter, co-approval with Level 5 or higher	With an award amount of \$1,500,000 or less that does not exceed the estimate within the most recent approved Project Charter, co-approval with Level 5 or higher		With an award amount of \$2,000,000 or less that does not exceed the estimate within the most recent approved Project Charter, co-approval within Level 5 or higher Co-approval with Level 6 for Contracts with an award amount exceeding the estimate within the most recent approved Project Charter by less than 10%	With an award amount exceeding the estimate within the most recent approved Project Charter by less than 10%, co-approval required	Board approval required for Contracts with an award amount that exceeds the estimate within the most recent approved Project Charter by greater than 10%
Category 3, (request for qualification and request for proposals required) Compensation Greater Than \$2,000,000					Co-approval with Level 6 for Contracts with an award amount up to \$2,000,000 that does not exceed the estimate within the most recent approved Project Charter Co-approval with Level 6 for Contracts with an award amount less than \$2,000,000 yet exceeding the estimate within the most recent approved Project Charter by less than 10%	Co-approval required	Board approval required for Contracts with an award amount greater than \$2,000,000 Board approval required for Contracts with an award amount that exceeds the estimate within the most recent approved Project Charter by greater than 10%
Category 4, Waiver of advertisement due to public exigency					With an award amount of any value, co-approval with Level 6, and with notification to the Board	Co-approval required	Board ratification required at the next subsequent meeting
For procurement awards for services INCLUDED in a Project Charter: Category 4, Waiver of advertisement when Professional Services are available through existing NJ State, GSA or other Governmental Contracts		With a contract amount of \$500,000 or less, co-approval with Level 5 or higher	With a contract amount of \$1,500,000 or less, co-approval with Level 5 or higher		With a contract amount of \$2,000,000 or less, co-approval within Level 5 or higher	With a contract amount of \$2,000,000 or less, co-approval with Level 5	Board notification required

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Operating Scope Professional Services	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
	Approvals for Levels 1, 2 and 3 must be staff from the Office of the Chief Operating Officer unless otherwise noted.						
For procurement awards for services not included in a Project Charter: Category 4, Waiver of advertisement when Professional Services are available through existing NJ State, GSA or other Governmental Contracts		With a contract amount of \$250,000 or less, co-approval with Level 5 or higher	With a contract amount of \$500,000 or less, co-approval with Level 5 or higher		Co-approval	Co-approval	Board approval required for contract amount greater than \$500,000
Construction Management Contracts		With an award amount of \$500,000 or less that does not exceed the estimate within the most recent approved Project Charter, co-approval with Level 5	With an award amount of \$1,500,000 or less that does not exceed the estimate within the most recent approved Project Charter, co-approval with Level 5		Co-approval with Level 6 for Contracts with an award amount up to \$2,000,000 that does not exceed the estimate within the most recent approved Project Charter Co-approval with Level 6 for Contracts with an award amount less than \$2,000,000 yet exceeding the estimate within the most recent approved Project Charter by no more than 10%	Co-approval required	Board approval required for Contracts with an award amount greater than \$2,000,000 Board approval required for Contracts with an award amount that exceeds the estimate within the most recent approved Project Charter by greater than 10%
Sole Source Procurement - In accordance with Executive Order 37 (Corzine)							Board Approval Required
Execution of Professional Services and/or Construction Management Consultant Contracts (after receipt of requisite approvals, including review by the Division of Law)		May singularly execute contracts resulting from a competitive bidding process and approved by Level 5 or lower	May singularly execute contracts resulting from a competitive bidding process and approved by Level 5 or lower		May singularly execute	May singularly execute	
Termination of Professional Services Consultant Agreements/Contracts for cause and/or convenience		After review and approval by the Office of Chief Counsel, staff from the Office of Project Management may co-approve the termination of Contracts/Agreements with an award amount of \$500,000 or less with Level 3	After review and approval by the Office of Chief Counsel, staff from the Office of Project Management may co-approve the termination of Contracts/Agreements with an award amount of \$1,500,000 or less with Level 5		After review and approval by the Office of Chief Counsel, the VP of Project Management may co-approve the termination of Contracts/Agreements with an award amount of \$2,000,000 or less with Level 6	After review and approval by the Office of Chief Counsel, CEO co-approval of the termination of Contracts/Agreements with an award amount of \$2,000,000 or less with the VP of Project Management	Board approval required for the termination of any Contract with an award amount greater than \$2,000,000
Delegation of Approval of Final Agency Action of Procurement Appeals and Bid Protests					VP of the Office of the COO may singularly sign Final Agency Action with consultation of Chief Counsel and the Division of Law		
The Members of the Board may request approving any contract award at the Project Charter approval stage. A monthly report to the Board of Directors listing all executed contracts for Professional Services is required. A monthly report to the Board of Directors listing all terminated Professional Services contracts and/or agreements is required. A monthly report to the Board of Directors listing all executed contracts with state, GSA and governmental agencies is required.							

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Contracts for Construction and Construction Related Services - A Competitive Bid Process For the procurement and award of contracts for contractors.							
Operating Scope Construction Services	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
	Approvals for Levels 1, 2 and 3 must be staff from the Office of the Chief Operating Officer unless otherwise noted.						
Contracts - Construction and Construction-related Services		For Contracts with an award amount of \$5,000,000 or less that does not exceed the estimate within the most recent approved Project Charter, co-approval with Level 3 or higher	For Contracts with an award amount of \$10,000,000 or less that does not exceed the estimate within the most recent approved Project Charter, co-approval with Level 4 or higher		For Contracts with an award amount of \$15,000,000 or less that does not exceed the estimate within the most recent approved Project Charter, co-approval within Level 5 or Level 6	For Contracts with a CCE amount of \$15,000,000 or less that exceed the estimate within the most recent approved Project Charter by no more than 10%, singular approval as per the Operating Scope relating to Final Project Budget	Board approval required for Contracts with an award amount greater than \$15,000,000 Board approval required when the Construction Contract Award resulting from a competitive bidding process exceeds 110% of the CCE in the most recent approved Project Charter
Sole Source Procurement - In accordance with Executive Order 37 (Corzine)							Board Approval Required
Execution of Construction and Construction-related Services Contracts (after receipt of requisite approvals, including review by the Division of Law)		May singularly execute contracts resulting from a competitive bidding process and approved by Level 5 or lower	May singularly execute contracts resulting from a competitive bidding process and approved by Level 5 or lower		May singularly execute	May singularly execute	
Termination of Construction and Construction-related Services Contracts for cause and/or convenience		After review and approval by the Office of Chief Counsel, staff from the Office of Project Management may co-approve the termination of Contracts with an award amount of \$5,000,000 or less with Level 3	After review and approval by the Office of Chief Counsel, staff from the Office of Project Management may co-approve the termination of Contracts with an award amount of \$10,000,000 or less with Level 5		After review and approval by the Office of Chief Counsel, the VP of Project Management may co-approve the termination of Contracts with an award amount of \$15,000,000 or less with Level 6	After review and approval by the Office of Chief Counsel, CEO co-approval of the termination of Contracts with an award amount of \$15,000,000 or less with the VP of Project Management	Board approval required for the termination of any Contract with an award amount greater than \$15,000,000
Delegation of Approval of Final Agency Action of Procurement Appeals and Bid Protests					VP of the Office of the COO may singularly sign Final Agency Action with consultation of Chief Counsel and the Division of Law		
The Members of the Board may request approving any contract award at the Project Charter approval stage. A monthly report to the Board of Directors listing all executed contracts for Construction and construction-related Services is required. A monthly report to the Board of Directors listing all terminated Construction contracts is required.							

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Contracts for Goods and Services - A Competitive Process (Procurement of any services or goods that are to be provided for broad School Construction Program and/or in connection with a specific school facilities project)							
Operating Scope Goods and Services	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
	Approvals for Levels 1, 2 and 3 must be staff from the Office of the Chief Operating Officer						
Category 1 or Compensation does not exceed \$29,000		Co-approval with Level 3 or higher					
Category 2 or Compensation that exceeds \$29,000 and Less Than \$500,000 (Request for Proposals)			Co-approval with Level 4 or higher				
Category 3 or Compensation equal to or greater than \$500,000 (Request for Qualification, Request for Proposal)							Board approval required
Category 4, Waivers of advertisement due to public exigency					With an award amount of any value, co-approval with Level 6, and with notification to the Board	Co-approval required	Board ratification required at the next subsequent meeting
For procurement awards for goods/services INCLUDED in a Project Charter: Category 4, Waiver of advertisement when Goods and Services are available under existing NJ State, GSA or other Governmental Contracts		Co-approval with Level 3 or higher for contracts of \$500,000 or less	Co-approval with Level 5 or higher for contracts up to \$2,000,000		Co-approval with level 3 for contracts up to \$2,000,000 Co-approval with level 6 for contracts greater than \$2,000,000	Co-approval with level 5 for contracts greater than \$2,000,000	Board notification required
For procurement awards for goods/services not included in a Project Charter: Category 4, Waiver of advertisement when Professional Services are available through existing NJ State, GSA or other Governmental Contracts		With a contract amount of \$250,000 or less, co-approval with Level 3 or higher	With a contract amount of \$500,000 or less, co-approval with Level 5 or higher		Co-approval	Co-approval	Board approval required for contract amount greater than \$500,000
Category 5 - Title Insurance Category 6 - Appraisers			With recommendation of the Managing Director, Real Estate Services, co-approval with Level 5 for expenses up to \$50,000		With recommendation of the Managing Director, Real Estate Services, co-approval within Level 5 or with Level 6 for expenses up to \$500,000	Co-approval required for expenses up to and including \$500,000	Board approval required for expenses greater than \$500,000
Category 7 - Experts - Consultation with Counsel and Division of Law required							Board approval required
Goods and Services Contracts with no assigned dollar value							Board approval required.
Sole Source Procurement - In accordance with Executive Order 37 (Corzine)							Board Approval Required

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Operating Scope Goods and Services	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
	Approvals for Levels 1, 2 and 3 must be staff from the Office of the Chief Operating Officer						
Execution of Goods and Services Contracts (after receipt of requisite approvals, including review by the Division of Law)		May singularly execute contracts resulting from a competitive bidding process and approved by Level 5 or lower	May singularly execute contracts resulting from a competitive bidding process and approved by Level 5 or lower		May singularly execute	May singularly execute	
Termination of Goods and Services Agreements/ Contract for cause and/or convenience					After review and approval by the Office of Chief Counsel, the VP of any Office managing a Goods and Services engagement may co-approve the termination of Contracts/Agreements with an award amount of \$500,000 or less with Level 6	After review and approval by the Office of Chief Counsel, CEO co-approval of the termination of Contracts/Agreements with an award amount of \$500,000 or less with the VP of any Office managing a Goods and Services engagement	Board approval required for the termination of Contracts/Agreements with an award amount greater than \$500,000
Delegation of Approval of Final Agency Action of Procurement Appeals and Bid Protests					VP of the Office of the COO may singularly sign Final Agency Action with consultation of Chief Counsel and the Division of Law		
A monthly report to the Board of Directors listing all executed contracts for Goods and Services is required. A monthly report to the Board of Directors listing all terminated Professional Services contracts and/or agreements is required. A monthly report to the Board of Directors listing all waivers for state, GSA, governmental agencies or for continuity is required.							

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Purchase Orders Placed on Contracts							
For purchases placed on State Contracts, GSA, Governmental Agencies, and Goods and Services Contracts previously awarded by the Authority.							
Operating Scope Purchase Orders	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
	Approvals for Levels 1, 2 and 3 must be staff from the Office of Program Management and Planning. Level 3 may also be the Sr. Director, Contract Procurement.						
Contracts - FFT&E Purchase Orders valued at \$250,000 or less that do not exceed the FFT&E estimate within the most recent approved Project Charter	Co-approval with Level 2 or higher	Co-approval with Level 2 or higher					
Contracts - FFT&E Purchase Orders valued at \$500,000 or less that do not exceed the FFT&E estimate within the most recent approved Project Charter		Co-approval with Level 3 or higher					
Contracts - FFT&E Purchase Orders valued at greater than \$500,000 or that exceed the FFT&E estimate within the most recent approved Project Charter			Co-approval with Level 3 or higher for orders that do not exceed the FF&E and Technology estimate within the most recent approved Project Charter Co-approval with Level 5 for purchase orders that exceed the estimate within the most recent approved Project Charter		Co-approval with Level 3 for orders that exceed the estimate within the most recent approved Project Charter		

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Miscellaneous Actions							
For grants and/or Agreements offered by the Authority; Undertaking Memoranda of Agreement and/or Understanding and/or Interagency Agreement; Payment approvals of insurance deductibles; etc.							
Operating Scope Miscellaneous Contracts	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
Execution of Memorandum of Agreement, Understanding and/or Interagency Agreement					May singularly execute	May singularly execute	Board approval required prior to execution
Offer of Grants to SDA Districts for Emergent Projects, Capital Maintenance, etc. (pursuant to 34, 34A regulations)		Upon recommendation from Facilities/Strategic Planning staff, Manager, Grant Program may singularly offer	Upon recommendation from Facilities/Strategic Planning staff, Sr. Director, Procurement may singularly offer		Upon recommendation from Facilities/Strategic Planning staff, may singularly offer		
Offer of Funding Agreements to SDA Districts		Upon recommendation from Facilities/Strategic Planning staff, Manager, Grant Program may singularly offer	Upon recommendation from Facilities/Strategic Planning staff, Sr. Director, Procurement may singularly offer		Upon recommendation from Facilities/Strategic Planning staff, may singularly offer		
Offer of Delegated Grants for Construction and/or Demolition							Board Approval Required
Offer of Grants to Regular Operating Districts (DOE Approved)		May singularly offer	May singularly offer		May singularly offer	May singularly offer	
Execution of Grants and Funding Agreements		Manager, Grant Program, Division of Procurement and Contract Services may singularly execute	May singularly execute	May singularly execute	May singularly execute	May singularly execute	
District Agreements (13C Implementation Agreement)				May singularly execute	May singularly execute	May singularly execute	
District Agreements (13D Maintenance Agreement)				May singularly execute	May singularly execute	May singularly execute	
Termination of any Grant/Agreement for Cause and/or Convenience (any dollar value)					Upon the recommendation of a Vice President, review and approval of Chief Counsel required	Review and approval required	Board Notification Required via a monthly report
Builders Risk Claim Payments - \$25,000 deductible	Co-approval with level 3 or higher	Co-approval with level 3 or higher	Co-approval				

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Operating Scope Miscellaneous Contracts	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
OCIP Claim Payments - \$250,000 deductible	Co-approval with level 3 or higher for deductible amounts less than \$25,000	Co-approval with level 3 or higher for deductible amounts less than \$25,000	Co-approval with Levels 1 or 2 for deductible amounts less than \$25,000 ----- Co-approval with Level 5 or higher for deductible amounts less than \$250,000		Co-approval for deductible amounts less than \$250,000	Co-approval for deductible amounts less than \$250,000	
Miscellaneous Insurance Claim Payments, including Property Damage and Bodily Injury (SDA Operations, TCU's included) - \$5,000 deductible	Co-approval with level 3 for deductible amounts up to \$5,000	Co-approval with level 3 for deductible amounts up to \$5,000	Co-approval for deductible amounts up to \$5,000				
Public Official Liability Insurance - Claim Payments, \$100,000 Deductible			Recommendation Required		Notification to Chief Counsel required Co-approval	Co-approval	Board Notification of claim required
SBE Mandated Subcontractor Substitution by Request of GC Due to Catastrophic Circumstances (i.e. Bankruptcy, Severe Illness, or Death)	Recommendation Required from Contract Compliance Coordinator	Assistant Director, Contractor & Workforce Compliance may co-approve	Co-approval	Review and approval of Chief Counsel required	Co-approval		Board Notification Required via a monthly report
Substitution of Statutorily Named Subcontractors by Request of GC Due to Extraordinary Circumstances Preventing Named Subcontractor Performance	Recommendation Required	Recommendation Required	May co-approve after review and approval by Chief Counsel		May co-approve after review and approval by Chief Counsel		Board Notification Required via a monthly report
A monthly report to the CEO listing all Insurance Claim Settlements over \$25,000 or the deductible is required. A monthly report to the Board of Directors listing all Grant offers is required.							

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Recommendation and Approval of Invoices Related to Projects and Program Activities Relating to Projects						
Operating Scope Expenditures	Operating Levels					
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6
Approval of School Facilities Project and Contract Invoices - Payment authorization for Real Estate Purchases, Project Initiation and Programming, Construction, Post-Construction and Grants Invoices, etc. (Excluding Design and Pre-Construction Services, Construction Management and Project Management Services, FFE, Technology, MOU/MOA, Program Wide Contracts, etc.)		Co-approval with Level 3 (or higher) of invoices not exceeding \$500,000	Regional Director, Project Management, Co-approval with Level 5 (or higher) of invoices of any amount Director of RE Services, Co-approval with Level 4 (or higher)of invoices not exceeding \$500,000	Managing Director of Real Estate Services may co-approve invoices of any value with the Chief Operating Officer	Co-approval of invoices of any amount	Co-approval of invoices of any amount
Approval of School Facilities Project Invoices related to Professional and Project Management - Services Received Pursuant to an Executed Contract Design Services (D), Construction Management (CM), Project Management Firm (PMF), etc.		Recommendation required *any PMF invoice exceeding \$250,000, must also be reviewed by Contract Management Dept. *any D or CM invoice exceeding \$100,000, must also be reviewed by Contract Management Dept.	Regional Director of PM co-approval with Level 5 of invoices of any amount.		Co-approval of invoices of any amount	Co-approval of invoices of any amount
Approval of FFE and Technology School Facilities Project Invoices - Goods and/or Services Received through placement of Purchase Orders (Staff processing purchase orders MAY NOT approve invoices relating to those purchase orders)	After recommendation of Purchasing Analyst, co-approval with Level 3 (or higher) of invoices not exceeding \$250,000		Co-approval with Level 5 of invoices of any amount Recommendation required for invoices relating to purchase orders authorized by this Level	Co-approval of invoices of any value	Co-approval of invoices of any amount	Co-approval of invoices of any amount
Approval of Invoices - Services Received under Program Wide or MOU/MOA agreements/contracts or other miscellaneous executed contracts	Recommendation required if managing an engagement	Recommendation required if managing an engagement	Recommendation required if managing an engagement Co-approval with Level 4 of invoices not exceeding \$250,000	Recommendation required if managing an engagement Co-approval with Level 5 of invoices of any amount	Co-approval of invoices of any amount	Co-approval of invoices of any amount
Approval of Miscellaneous School Facilities Project Invoices - <i>Services Received Without Formal Executed Contracts</i> - Bond Issuance Costs, Utility Bills, Utility Connections, Utility Relocations, Printing and Advertisement, Real Estate taxes, Permit Fees, etc.	Co-approval of invoices not exceeding \$5,000 with Level 2 (or higher)	Co-approval of invoices not exceeding \$10,000 with Level 3 (or higher)	Co-approval of invoices not exceeding \$25,000 with Level 4 (or higher)	Co-approval of invoices not exceeding \$50,000 with Level 5 (or higher)	Co-approval of invoices of any amount	Co-approval of invoices of any amount
Payment Requisition Approval (Payments Completed by Disbursement Agent)			Co-approval of any requisition prepared/signed by an Accounts Payable staff person	Co-approval of any requisition prepared/signed by an Accounts Payable staff person	Co-approval of any requisition prepared/signed by an Accounts Payable staff person	

New Jersey Schools Development Authority
OPERATING AUTHORITY BY LEVEL

Authority Operations							
Includes Annual Operating Budget Processes: Payment Operations, Purchases for Operations, etc. (All checks issued by New Jersey Schools Development Authority require two signatures from approved parties. Signature approval is based upon CEO determination.)							
Operating Scope Authority Operations	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
	For Operating Scopes relating to Procurement/Purchasing and Equipment Leasing, approval Levels 1 and 2 must be staff from the Office of the COO.						
Commitment of Funds - Procurement of Goods and Services for Operational Needs Under Existing NJ State, GSA, or other Governmental Contracts (With Process Approval from Sr. Director, Office of the COO)		Co-approval with Level 3 for Purchase Orders/Contracts less than \$50,000	Co-approval with Level 4 or higher for Purchase Orders/Contracts of any value	Co-approval with Level 5 or higher	Co-approval	Co-approval	
Commitment of Funds - Execution of Purchase Orders and/or Procurement of Goods and Services for Operational Use (With Process Approval from Sr. Director, Office of the COO)		Co-approval with Level 3 or higher for Purchase Orders up to \$50,000	Co-approval with Level 2 for Purchase Orders up to \$50,000 Co-approval for Contracts not exceeding \$300,000 with Level 4 or higher	Co-approval for Contracts of any value	Co-approval for Contracts of any value with Level 6	Co-approval	
Commitment of Funds - Leases NJSDA Leases of Equipment, Software, etc. (NJSDA is Lessee)		Co-approval with Level 3 or higher for Leases up to \$50,000	Co-approval with Level 2 for Leases up to \$50,000 Co-approval for Leases not exceeding \$300,000 with Level 4 or higher	Co-approval for Leases of any value	Co-approval for Leases of any value with Level 6	Co-approval	
Commitment of Funds - Leases NJSDA Operating Facilities Leases with term of 1 year or less.				Managing Director of Real Estate Services must recommend	Co-approval with Level 5 or higher for leases of NJSDA facilities	Co-approval with Level 5 for leases of NJSDA facilities	
Commitment of Funds - Leases NJSDA Operating Facilities Leases with term greater than 1 year.				Managing Director of Real Estate Services must recommend			Board approval required
Approval of Goods and Services Invoices and NJSDA Check Requests Pursuant to an Executed Contract or Purchase Order	Co-approval up to \$5,000	Co-approval up to \$10,000	Co-approval up to \$50,000 with Level 4 or higher	Co-approval up to \$250,000 with Level 5 or higher	Co-approval of invoices of any amount	Co-approval of invoices of any amount	
Approval of Goods and Services Invoices and NJSDA Check Requests Without an Executed Contract or Purchase Order (Utility bills, etc.)			Co-approval with Level 4 or higher for amounts up to \$10,000	Co-approval with Level 5 up to \$25,000	Co-approval with Level 6 up to \$50,000	Co-approval up to \$50,000	

New Jersey Schools Development Authority
OPERATING AUTHORITY BY LEVEL

Operating Scope Authority Operations	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
	For Operating Scopes relating to Procurement/Purchasing and Equipment Leasing, approval Levels 1 and 2 must be staff from the Office of the COO.						
Levels 1, 2 and 3 must be staff from the Office of the COO, Division of Human Resources							
Approval of Invoices and NJSDA Check Requests for goods and services related to Administrative Personnel Functions (help wanted ads, employee parking costs, long term disability payments, medical and dental premiums and claims, wage garnishments, pass through disbursements of charitable contributions, etc.)	Co-approval with Level 3 up to \$25,000	Co-approval with Level 3 up to \$25,000	Co-approval with Level 1 or 2 for amounts up to \$25,000 Co-approval with COO or CEO for non-discretionary invoice amounts up to \$250,000		COO and CEO co-approval for discretionary invoice amounts greater than \$25,000 ----- COO co-approval with level 3 for non-discretionary invoice amounts up to \$250,000 ----- Co-approval with Level 6 for non-discretionary invoices of any amount	CEO and COO co-approval for discretionary invoice amounts greater than \$25,000 ----- CEO co-approval with level 3 for non-discretionary invoice amounts up to \$250,000 ----- Co-approval for non-discretionary invoices of any amount	
Approval of Employee Expense Reimbursements (Approvals may be obtained from succeeding higher Levels based upon supervisor availability)	After employee certification, singular approval of direct reports' expenses less than \$100	After employee certification, singular approval of direct reports' expenses less than \$250	After employee certification, singular approval of direct reports' expenses	After employee certification, singular approval of expenses	After employee certification, singular approval of expenses. Singular approval of all other colleagues expenses in Level 5 Singular approval of Level 6 expenses up to \$500	Singular approval of expenses	Chairman of the Board singular approval of CEO expenses greater than \$500
Authorization for Check Signing and Fund Transfers	All checks and transfer of fund actions require the signature from two approved parties. Designation of individuals for approval is based upon CEO determination. *						
Approval of Sale, Trade or Disposal of Schools Facility Project and/or Operational Assets CFO notification required			Co-approval with Level 4 or higher of assets with an estimated fair market value of up to \$25,000 CFO notification required	Co-approval with Level 5 of assets with an estimated fair market value of up to \$100,000 CFO notification required	Co-approval with Level 5 or 6 of assets with an estimated fair market value of up to \$250,000 CFO notification required	Co-approval of assets with an estimated fair market value of up to \$500,000 CFO notification required	Board approval required for transactions with an estimated fair market value exceeding \$500,000
* Currently, the CEO has defined co-approval with one signatory being VP or CEO Level. Upon the recommendation of the CFO, second signatory is a Senior Director/Managing Director.							

New Jersey Schools Development Authority
OPERATING AUTHORITY BY LEVEL

Change Orders/Construction Change Orders Contract Management Department approval is required for Change Order requests over \$100K and with time extensions over 30 days. Note: Project Budget Manager of each Project Team <i>must</i> verify the availability of funds prior to the construction change recommendation made at Level 1.							
Operating Scope Change Orders	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
	Approvals for Levels 1, 2, 3 and 4 must be from the Office of Project Management						
Change Order or a Credit Change Order which singularly does not exceed \$50,000 and does not exceed 10 days	Co-approval with supervisor from Level 2 or from succeeding higher levels based only on supervisor availability	Co-approval with Level 1				After review and approval by the Contract Management Department for any time extension exceeding 30 days or any time extension impacting occupancy date, CEO notification required	
Change Order or a Credit Change Order which singularly does not exceed \$75,000 and does not exceed 15 days	Recommendation required	Co-approval with Level 3 or from succeeding higher levels based only on supervisor availability	Co-approval with Level 2			After review and approval by the Contract Management Department for any time extension exceeding 30 days or any time extension impacting occupancy date, CEO notification required	
Change Order or a Credit Change Order which singularly does not exceed \$150,000 and does not exceed 30 days	After review and approval by the Contract Management Department for any change order or credit change order exceeding \$100,000 recommendation required	After review and approval by the Contract Management Department for any change order or credit change order exceeding \$100,000 recommendation required	Co-approval with Level 4 or from succeeding higher levels based only on supervisor availability	Co-approval with Level 3		After review and approval by the Contract Management Department for any time extension exceeding 30 days or any time extension impacting occupancy date, CEO notification required	
Change Order or a Credit Change Order which singularly does not exceed \$250,000 and does not impact occupancy date of the project	After review and approval by the Contract Management Department, recommendation required	After review and approval by the Contract Management Department, recommendation required	After review and approval by the Contract Management Department, recommendation required		Vice-President of Project Management co-approval within Level 5 or above	After review and approval by the Contract Management Department for any time extension exceeding 30 days or any time extension impacting occupancy date, CEO notification required	
Change Order or a Credit Change Order which singularly exceeds \$250,000	After review and approval by the Contract Management Department, recommendation required	After review and approval by the Contract Management Department, recommendation required	After review and approval by the Contract Management Department, recommendation required				Board approval required

New Jersey Schools Development Authority
OPERATING AUTHORITY BY LEVEL

Change Orders/Construction Change Orders
Contract Management Department approval is required for Change Order requests over \$100K and with time extensions over 30 days.
Note: Project Budget Manager of each Project Team *must* verify the availability of funds prior to the construction change recommendation made at Level 1.

Operating Scope Change Orders	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
Change Order which singularly or in the aggregate exceeds: - Board-approved Project Charter contingency - CEO-approved additional contingency	After review and approval by the Contract Management Department, recommendation required	After review and approval by the Contract Management Department, recommendation required	After review and approval by the Contract Management Department, recommendation required				Board approval required

Operating Levels - any given lowest required level is expected to seek co-approval from the supervisory level of that position. Lower levels shall have approved actions prior to seeking required level approvals.

Monthly Reports will be provided to the Board of Directors including:
1. Projects that have expended 75% of their Board-approved Project Charter contingency amount
2. Projects that are projected to exceed their Board-approved Project Charter contingency amount
3. Projects indicating the possible compromise of an occupancy date, inclusive of recovery plan, as appropriate
4. All approved Change Orders during the previous month.

New Jersey Schools Development Authority
OPERATING AUTHORITY BY LEVEL

Construction Change Directives							
	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
Operating Scope Change Directives	Approvals for Levels 1, 2, 3, 4 and 5 must be staff from the Office of Project Management and holding titles of Manager, Assistant Director, Senior Manager or Regional Director or Vice President or Chief Counsel						
Issuance of a zero value Directive which singularly does not exceed a SDA-estimated cost of \$75,000	Recommendation required	Co-approval with Level 3	Co-approval with Level 2		Notification to the Office of Chief Counsel required prior to approval		Monthly report, including CCD estimated values, required.
Issuance of a zero value Directive which singularly does not exceed a SDA-estimated cost of \$250,000	Recommendation required	Recommendation required	Recommendation required		Co-approval of Vice President, Office of Project Management and Chief Counsel		Monthly report, including CD estimated values, required.
Issuance of a zero value Directive which singularly exceeds a SDA-estimated cost of \$250,000	Recommendation required	Recommendation required	Recommendation required		Recommendation of VP, Project Management required, Chief Executive Officer and Chief Counsel must co-approve	Chief Executive Officer and Chief Counsel must co-approve	Monthly report, including CD estimated values, required.
Notification to Contract Management Department and Chief Counsel required. Operating Levels - any given lowest required level is expected to seek co-approval from the supervisory level of that position. Lower levels shall have approved actions prior to seeking required approvals.							

New Jersey Schools Development Authority
OPERATING AUTHORITY BY LEVEL

Amendments to Real Estate Services Contracts							
	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
Operating Scope Amendments to Real Estate Services Contracts							
	Approvals for Levels 1, 2, 3 and 4 must be staff from the Office of the Chief Operating Officer, Real Estate Services Division and holding titles of Specialist, Sr. Specialist, Manager, Sr. Manager, Director, Senior Director or Managing Director						
Change Order/Amendment which singularly does not exceed \$25,000	Recommendation is required	Co-approval with Level 3 or from succeeding higher levels based only on supervisor availability	Co-approval with Level 2	Co-approval	COO and/or Chief Counsel may co-approve with written delegation from the CEO, or after consultation with CEO in the event of an urgent matter	Co-approval with any Level.	Monthly report on activity required
Change Order/Amendment which singularly does not exceed \$50,000	Recommendation required	Recommendation required	Co-approval with Level 4 or from succeeding higher levels based only on supervisor availability	Co-approval with Level 3	COO and/or Chief Counsel may co-approve with written delegation from the CEO, or after consultation with CEO in the event of an urgent matter	Co-approval with any Level.	Monthly report on activity required
Change Order/Amendment which singularly does not exceed \$100,000	Recommendation required	Recommendation required	Recommendation required	Co-approval with Level 5	COO and/or Chief Counsel may co-approve with written delegation from the CEO, or after consultation with CEO in the event of an urgent matter	Co-approval with any Level.	Monthly report on activity required
Change Order/Amendment which exceeds \$100,000	Recommendation required	Recommendation required	Recommendation required	Recommendation required			Board approval required
Operating Levels - any given lowest required level is expected to seek co-approval from the supervisory level of that position. Lower levels shall have approved actions prior to seeking required level approvals.							

New Jersey Schools Development Authority
OPERATING AUTHORITY BY LEVEL

Amendments to Professional Services, Project Management or Construction Management Firm Contracts
Contract Management Department shall approve *all* amendments

Operating Scope Amendments	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
	Approvals for Levels 1, 2, 3 and 4 must be staff from the Office of Project Management						
Amendment or a credit amendment which singularly does not exceed \$250,000, or singularly or in the aggregate does not exceed 5% of the revised base contract amount	After review and approval by the Contract Management Department, recommendation required	After review and approval by the Contract Management Department, recommendation required	Regional Director may co-approve with Level 5		Vice President of Project Management may co-approve		Delegated approval to the CEO of any Amendment which singularly or in the aggregate exceeds 5% of the revised base contract amount when the value of that Amendment is less than \$50,000
Amendment or a credit amendment which exceeds \$250,000, or singularly or in the aggregate exceeds 5% of the revised base contract amount	After review and approval by the Contract Management Department, recommendation required	After review and approval by the Contract Management Department, recommendation required	After review and approval by the Contract Management Department, recommendation required		With the advice of Chief Counsel , recommendation required by the Vice President of Project Management		Board approval required except Delegated approval to the CEO of any Amendment which singularly or in the aggregate exceeds 5% of the revised base contract amount when the value of that Amendment is less than \$50,000
Operating Levels - any given lowest required level is expected to seek co-approval from the supervisory level of that position. Lower levels shall have approved actions prior to seeking required level approvals.							

New Jersey Schools Development Authority
OPERATING AUTHORITY BY LEVEL

Amendments to Goods and Services Contracts, including "Program Wide" Contracts for both Schools Facilities Projects and Authority Operational Contracts							
	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
Operating Scope Amendments to Any Goods and Services Contracts							
Amendment which singularly does not exceed \$100,000	Recommendation required	Co-approval with Level 3 or higher, based upon availability and with notification to the Audit Committee and Board of Directors	Co-approval with Level 3 or higher and with notification to the Audit Committee and Board of Directors	Co-approval with Level 4 or higher and with notification to the Audit Committee and Board of Directors	Co-approval with any Level	Co-approval with any Level	
Amendment which singularly does not exceed \$250,000	Recommendation required	Recommendation required	Co-approval with Level 3 or higher and with notification to the Audit Committee and Board of Directors	Co-approval with Level 4 or higher and with notification to the Audit Committee and Board of Directors	Co-approval with any Level	Co-approval with any Level	
Amendment which exceeds \$250,000	Recommendation required	Recommendation required	Recommendation required	Recommendation required			Board approval required with recommendation from the Board's Audit Committee
Monthly report to the Board of Directors on Goods & Services Change Order/Amendment activity required.							
*SDA contracts provide for a Program Manager, the NJSDA staff member(s) designated to manage the Consultant's performance of Services. Operating Levels - any given lowest required level is expected to seek co-approval from the supervisory level of that position. Lower levels shall have approved actions prior to seeking required level approvals. Supervisory co-approval should be given within 24 hours of receipt of action item. The Office of the Chief Financial Officer must be notified of every Change Order/Amendment prior to approval.							

New Jersey Schools Development Authority
OPERATING AUTHORITY BY LEVEL

Amendments to all executed Grants Contract Management Department shall approve <i>all</i> amendments							
Operating Scope Amendments	Operating Levels						
	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7
	Approvals for Levels 1, 2, 3 and 4 must be staff from the Office of the Chief Operating Officer						
Grant project amendment or a credit amendment which singularly does not exceed \$250,000, or singularly or in the aggregate does not exceed 5% of the revised base grant amount		Co-approval with level 5	Co-approval with level 5		Co-approval		
Grant project amendment or a credit amendment which exceeds \$250,000, or singularly or in the aggregate exceeds 5% of the revised base grant amount							Board Approval Required
Change Orders to Capital Maintenance Grants (13A)		Co-approval with level 5	Co-approval with level 5		Co-approval		
Operating Levels - any given lowest required level is expected to seek co-approval from the supervisory level of that position. Lower levels shall have approved actions prior to seeking required level approvals.							